
**Sample
Participant Workbook
(PW)**



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Workshop Planning Meeting

Scheduling a workshop planning meeting with key project stakeholders is a way to initiate the partnering process. This meeting should be attended by the PE (or RE) and the PM and other key stakeholders leaders, if appropriate, in advance of the partnering workshop. There are nine objectives or elements of this meeting.

1. Establish the partnership model to be followed.
2. Discuss project risk, key issues, and partnership challenges.
3. Outline the joint expectations of the agency and the contractor—including mutual goals for the project—to be discussed at the partnering workshop.
4. Determine who should attend the workshop.
5. Emphasize the roles and responsibilities of the project participants to make partnering successful (AASHTO *Partnering Handbook*).
6. Determine the type of workshop.
7. Determine who will facilitate the workshop.
8. Develop the workshop agenda including determining the time, date, and location for the workshop.
9. Discuss lines of authority, decision-making authority, and communication authority. Prepare a draft issue resolution escalation ladder for the partnership.

These nine elements are discussed in detail on the next several pages.

Workshop Planning Meeting

- Initiates the partnering process
- Allows key stakeholders to meet before the workshop
- Include PE (or RE) and PM and other stakeholder leaders

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Participant Notes

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The nine elements of the workshop planning meeting in detail include:

1. Establish the partnership model to be followed.
 - Emphasize what partnering is (if appropriate) so that the participants can understand the benefits.
2. Discuss project risk, key issues, and partnership challenges.
 - Review all actual and potential issues that could affect the project and incorporate these into the workshop agenda.
 - Discuss the project schedule.
 - The agency and the contractor should convey what their needs and expectations are.
3. Outline the joint expectations of the agency and the contractor—including mutual goals for the project—to be discussed at the partnering workshop.

NOTE: For more information about these topics, see Appendix D for the AASHTO Partnering Handbook.

Workshop Planning Meeting

- # 1. Establish partnering model
- # 2. Discuss risk, issues, challenges
- # 3. Outline joint expectations

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Participant Notes

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4. Determine who should attend the workshop. Factors to be considered when selecting the workshop participants should include:
 - Can the organization impact project completion?
 - Who has decision-making authority within this organization?
 - Who from this organization has day-to-day authority to determine progress on the project?
5. Emphasize the roles and responsibilities of the project participants to make partnering successful using the following attributes (*AASHTO Partnering Handbook*):
 - Practice open, genuine communication.
 - Give feedback in a helpful, positive, concerned manner.
 - Leave a person's self-esteem intact when giving feedback.
 - Seek first to understand, then to be understood.
 - Model partnering behaviors.
 - Take a leadership role in modeling partnering behaviors.
 - Use the charter as a framework.
 - Attend meetings and be prepared to contribute to the outcome.
 - Be an active participant in all meetings.
 - Help the other team members; ask for help when you need it.
 - Bring up real issues and help the team follow issue resolution in a professional manner.
6. Determine the type of workshop.

NOTE: For more information about these topics, see Appendix D for the AASHTO Partnering Handbook.

Workshop Planning Meeting (cont.)

- # 4. Determine who attends workshop
- # 5. Emphasize roles and responsibilities
- # 6. Determine the type of workshop

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Participant Notes

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7. Determine who will facilitate the workshop. The AGC's Partnering Manual notes that a facilitator will:
 - Assist the group in working together on goals and issues.
 - Create an environment of openness and trust.
 - Aid in consensus building and commitment.
 - Establish credibility and trust.
 - Match the "personality and style" of participants.
 - Serve as a positive role model.
 - Organize the workshop.
 - Determine what participants want from the workshop.
 - Know and understand the background of the project, stakeholders, and the project.
 - Keep the meeting focused on issues at hand.
 - Encourage all to participate.
 - Record or appoint a recorder to take notes.
 - Keep the discussions moving and pertinent.
 - Listen to the participants.
 - Help the group reach consensus.
 - Constructively channel disagreements.
8. Develop the workshop agenda including determining the time, date, and location for the workshop.
 - Prepare a notice of meeting that is jointly signed by the PE and PM inviting the key stakeholders to the partnering workshop.
 - Request that the invitees confirm their attendance.
9. Discuss lines of authority, decision-making authority, and communication authority.
 - Prepare a draft issue resolution escalation ladder for the partnership.

NOTE: For more information about these topics, see Appendix D for the AASHTO Partnering Handbook.

Workshop Planning Meeting (cont.)

- # 7. Determine who will facilitate
- # 8. Develop workshop agenda
- # 9. Discuss lines of authority, decision-making, and communication

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Participant Notes

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